

# NAESB OS SAMTS Assignment

NAESB OD Prep Meeting  
January 2014



# NAESB OS SAMTS Assignment

## ■ Assignment

- Review Parking Lot Requirements 62, 83, 84 and 85 from the standpoint of how Coordinated Requests and Coordinated Groups would be treated in STCP scenario using the existing SAMTS BPs.
- NOTE: STCP for SAMTS only applies to service increments of a month (which are the shortest service increment available for a SAMTS type request). Annual requests would need to be considered in the Long Term Competition Assignment.

# Definitions (WEQ-000)

- SAMTS – Scheduling Across Multiple Transmission Systems
- Coordinated Request (CR)– a PTP or NITS request that is a part of a Coordinated Group
- Coordinated Group (CG) - Two or more PTP and/or NITS requests that are linked together for the purpose of procuring service across multiple transmission systems on a transmission path. The Coordinated Group shall be made up of two or more requests, and may include reservations, such that there is no gap in service over a given path to meet contiguity requirements.

## Requirement 62

- 4/11/12 Coordinated Requests for Competition: should there be a feature that returns a defending reservation their original granted characteristics (duration, MW, price, etc.) that it lost due to not matching a competition, when the challenger fails to confirm a Counter-offer.
- 6/27/13 Should matching requests be precluded from being in a coordinated requests?

## Requirement 62 – OS Issue/Comment

6/27/13 Look at SAMTS in the standards to see if this is applicable. If this is talking about reservations then it is not a SAMTS issue because reservations are no longer coordinated. If talking about requests then need to look at the SAMTS standards because the requests are coordinated.

## Comment on 04/11/12 Issue

- **001-23.1.3** A Coordinated Request shall be queued and evaluated in the same manner (i.e., same service priority) as any other PTP or NITS request, subject to the other requirements of Business Practice Standard WEQ-001 as if the Coordinated Request were not part of a Coordinated Group.
- A transmission request is pending and does not have a matching scenario.

# Comments to Requirement 62 (6/27/13)

- **001-23.2.1** 'The Coordinated Group shall be contiguous over time and path. Contiguity of a Coordinated Group shall encompass all Coordinated Requests, and may include existing reservations, such that there shall be no gaps in service over a commercially reservable path across all the Transmission Providers' systems in the Coordinated Group ...
- A Matching profile could be submitted to retain a reservation in the Coordinated Group. It would be an extension of the current reservation. Should a reservation in a CG be subject to competition?

## Requirement 83

- 8/1/13 How are the CR\_ACCEPT and CR\_COUTEROFFER types handle in a P&C process? Should requests with these states be exempted from being P&C Defenders or otherwise be treated differently from non-CG pending requests.
- Since annual requests may trigger additional study process, should a CG that contains one or more annual requests exempt the entire group from competition?



# Comments to Requirement 83

- **001-23.3.7** The Eligible Customer or Transmission Customer may change the STATUS from CR\_ACCEPTED or CR\_COUNTEROFFER to CONFIRMED prior to knowing the final outcome of all Coordinated Requests in a Coordinated Group. Once a Coordinated Request is set to CONFIRMED, no subsequent adjustment in capacity shall be permitted.
- Does the TC need to 'CONFIRM' a preconfirmed coordinated request?
- It seems that once a CR is 'CONFIRMED' it can't be competed while still in the CG state.
- Should CR's be bumped (e.g. pending state)?
- Annual Requests - Service increments longer than a month fit into the Long Term Competition Assignment.

## Requirement 84

- 8/1/13 If the reservation in the CG group is preempted or reduced what happens to the remaining requests in the CG group? Does the customer have an option to modify the existing requests in the CG group?

## Comments to Requirement 84

- 001.23.3.7. - appears to preclude a reservation that is still in the CG state to be modified (i.e., competed).
- Modification of a CR - **001-23.3.9** 'The Eligible Customer or Transmission Customer may rebid a lower capacity than granted or withdraw the Coordinated Request if any Coordinated Request in the Coordinated Group has not been granted the requested capacity in full.'

## Requirement 85

- 8/1/13 Should a matching request continue to be allowed to trigger a new CG? The current practice allows this but this might add an unacceptable time delay in processing the original ROFR activity. (For example: A two month firm PTP reservation is required to match an 11 month Challenger in order to keep capacity. Should the matching request be permitted to initiate a new 11 or 9 month CG? The original match could not be processed until the CG status was resolved.)

## Comment to Requirement 85

- A reservation in a CG state can't be changed (WEQ-001.23.3.7)
- The CRs in a CG may have staggered durations and transmission capacity but this is a mute point since the reservation can't be challenged while in the CG state.